IOWAccess
Project 5 - Online Local Government Budget, Tax & Valuation System
Team Meeting
June 8, 1998, 3:00 - 4:30 P.M.

Ron Amosson, Co-Chair, Iowa Department of Management (DOM)
Phil Hurst, Co-Chair, Clay County Auditor
Marlys Gaston, Office of State Auditor
Jerry Reid, Iowa Department of Management
Mike Albers, Iowa Department of Management
Mary Jo Detrick, Clark Community School District
Donna Gregory, Clarinda Community School District
Grant Veeder, Black Hawk County Auditor
Chris Plocher, Iowa State Association of Counties
Dennis Dietz, League of Iowa Cities
Ed Velie, Iowa Association of School Boards

Others Attending:
Lowell Sneller, Information Technology Services

Staff:
Linda Plazak
Ruth Melone

Solu Tech Staff
Wade Powell
Larry Kelley

Iowa Interactive Staff:
Matt Theobald

Welcome:
Ron Amosson welcomed team members, including co-chair, Phil Hurst. Team members
introduced themselves.

Review of Phase 1 - Electronic Budget and Tax Information System
Ron Amosson stated that Project 5 continues to make very good progress. The goal of
having electronic budget documents completed by late 1997, for use in completing the
1998-99 budgets, was met in December 1997. The goal of having designed the software
so it would work on any personal computer was also met - the software works on any
computer with Windows. Another goal achieved was to ensure that the budgets of cities,
counties, and school districts completed electronically were error free, user-friendly, etc.
County feedback for the most part was quite positive. 100% of the counties used the

software, due in part to the training and encouragement from the DOM. 27% of school districts used the system; we would like to increase school district usage. Cities and schools received less extensive training than the counties. 429 cities, or 49% of cities, submitted their information electronically, which is quite good considering the size and computer capabilities of many Iowa cities. Several counties helped cities submit their information electronically which helped increase city participation. Amosson stated that they would like to help the counties expand their assistance to cities. Finding ways to increase usage by school districts is another goal.

Software was also developed for processing the budgets once the state receives them. Another aspect of Phase 1 is getting information on the Web page. Information to be included is local budgets, property valuations, tax rates, etc. Development of the Web page in currently in process.

Demonstration of Phase 1 Product by Solutech
Amosson introduced Wade Powell and Larry Kelley of Solutech. Powell reviewed the work they did in developing the budget software. Solutech developed a product that could be used by cities and counties to easily create their budget and remit the information to the state. This information will be entered by the State into a database for further processing. Powell gave a demonstration of the use of the system and also showed the project team the Web page. Powell also demonstrated how this information could be accessed from the Web page.

Wrap-up of Phase 1
Amosson reported that Project 5 will have spent its entire budget ($193,000) by the time the Web page is fully developed. These expenditures did not include any development of the valuation phase of the project.

Matt Theobald from Iowa Interactive introduced himself, and requested input from Project 5 team members on how the team would like Project 5 to fit in with the development of the Web page under Project 1. There was discussion regarding whether there was a need for an intermediary page between Project 1 page and Project 5's Web site. The project leads will make a decision on this issue. Theobald suggested looking at Indiana's County home page, www.indi.co.net. ISAC's Committee on the Future is proposing to build a home page for each Iowa county, and was interested in seeing if this page could link to the county pages.

Phase 2 - Electronic Valuation System
Amosson reported that the development of the valuation system is a continuation of Project 5's original goal. Valuation information and annual financial reports from cities and counties are part of the second phase. The valuation system is a very complex process and this phase would create a new valuation system that is uniform for all counties, user-friendly, error-free, and will result in timely reports from the counties to the Department of Management and from the Department of Management to the counties. The person who previously processed the valuation reports for the Department of Management left state government. Processing the current year's reports has been slow

because of inexperience with the current system. Processing the current valuations for this year and learning the process demanded a significant amount of time. This part of the Phase 2 is slightly delayed because of this, but will be given greater attention later this month.

Larry Kelley made a presentation regarding the scope of the valuation portion of Phase 2 of the project.
Field Version - County Use
Kelley stated that the field version is for county use and is actually a subset of the administrative version. See attachment for a list of uses.

Administrative Version - DOM Use
See attachment for list of uses. Many of the activities in this portion are presently being done on a mainframe, which is cumbersome and does not readily allow for error checking.

Open version - for public use
See attachment for list of uses. Team members requested that this information be available on the Internet. Amosson asked team members to let him know what other types of information they would like to see on the Internet.

Project 5 received additional funds to continue with valuations and annual financial reports, Phase 2. The goal is to have the annual financial reports completed so that cities and counties can use them for the current annual reports.

Plazak stressed to project team members to think about what is needed on the Web pages. We appreciate your views and want feedback and input from cities, counties, schools, and citizens.

Theobald requested suggestions and information be sent to him at his e-mail address: theobald@iowaccess.org.

As designed under Phase 2, the Annual Financial reports will have the same type of information in the same format as the budget.

Question and Answer Session
Amosson opened the meeting up for questions from team members. There was discussion regarding the Web page.

Plazek stated a few more things that the team needs to do. It is important to develop evaluation criteria. An overall training plan also must be developed. We need an awareness or marketing campaign so citizens are aware that this project exists.

Next Meeting
Amosson stated that all activities must be completed by September 30.

July 13 or 20 works well for most team members. A date will be finalized soon by the staff.

Amosson thanked team members for all the work they have done, and all the counties, cities, and school districts which submitted information electronically.

The meeting was adjourned at 4:30 p.m.